



5 practical ways to get more value from Copilot Business

See how Copilot Business works for different tasks and teams across your organisation



In a growing business, every part of the operation is moving at once. It is not always easy to stay on top of sales activity, customer conversations, marketing content, hiring needs and financial workflows all at the same time.




Microsoft 365 Copilot is an AI assistant embedded in the tools your teams already use (Word, Excel, PowerPoint, Outlook, Teams, and more) so you get faster workflows, better collaboration, and less time spent on repetitive tasks.

It works with your business context to automate busywork and let people focus on customers, insights, and innovation.

This guide provides a summary of how Copilot Business can help you work smarter across five key functions:

- 01** Sales
- 02** Marketing
- 03** Customer service
- 04** HR
- 05** Finance

AI empowers people to achieve more by

-  Giving you a jump start on content generation
-  Boosting your creativity
-  Helping you find information and get through your daily work faster



Sales

Reduce prep time and administrative load

Faster meeting preparation

Copilot summarises email, chat, and document history so sellers can quickly understand deal context, open questions, and recent customer activity.

Proposal and pitch development

In Word and PowerPoint, Copilot generates proposal drafts and presentation structures based on existing templates and past materials, letting sellers refine instead of start from scratch.

Support during customer meetings

With Copilot in Teams, sellers can stay focused on the conversation while Copilot captures notes, decisions, and follow-up actions.

Stronger follow-up communication

Copilot in Outlook drafts clear recap emails that highlight commitments and next steps, helping sales teams keep momentum and improve customer alignment.

Marketing

Evolve content creation and cut planning time

Campaign and content planning

Copilot can generate campaign outlines, suggest assets, and check existing content libraries to prevent duplication.

Messaging and asset drafting

Marketers can use Copilot in Word and PowerPoint to produce first drafts of message maps, one-pagers, or slide content tailored to tone, industry, or audience.

Personalised outreach

Copilot drafts variations of emails or copy tailored to different customer segments or industries, supporting personalisation at scale.

Cross-team alignment

Copilot summarises feedback and drafts internal briefs, helping marketing keep stakeholders aligned without repeated manual updates.

Human Resources

Lessen manual workloads and speed up hiring cycles

Job descriptions and role materials

Copilot in Word generates job descriptions using existing criteria, making it easy to adjust responsibilities or seniority.

Interview planning

Using Loop, HR can develop interview guides and panel structures based on required competencies.

Candidate evaluation

In Teams, Copilot summarises candidate responses and contributions, helping hiring managers make decisions more efficiently.

Policy and communication drafting

HR teams use Copilot to create or update policy documents and draft employee communications with clear, consistent language.

Customer service

Rapidly analyse issues and streamline communication

Customer service teams gain efficiency by using Copilot to analyse issues and streamline communication.

Identifying recurring issues

Copilot reviews support conversations and tickets to surface common themes or potential root causes, helping teams address problems faster.

Updating knowledge articles

Copilot in Word drafts or refreshes FAQs and help content based on recent customer interactions and internal documentation.

Support response drafting

Agents use Copilot to summarise cases and generate recommended responses, improving consistency and speed.

Insights for stakeholders

Copilot can produce summary reports and recommendations for product or leadership teams based on customer trends.

Finance

Accelerate analysis and reporting within existing workflows

Data analysis in Excel

Copilot answers data questions, spots trends, and creates visualisations, reducing time spent on manual manipulation.

Scenario and forecast development

Analysts can generate variations of forecasts or sensitivity models quickly by prompting Copilot with specific assumptions.

Narrative and reporting support

Copilot drafts commentary for monthly or quarterly reports and helps build PowerPoint presentations based on Excel data and meeting notes.

Cross-functional communication

Teams use Copilot in Teams to summarise discussions, track follow-up actions, and coordinate with business units during planning cycles.

Boost your ROI with supercharged productivity

According to a Microsoft-commissioned Forrester Total Economic Impact report, the return on investment from Microsoft 365 Copilot for small to medium businesses (SMBs) can range from 132% to 353%.¹

Forrester also found that SMBs can experience up to 6% greater net revenue, 20% less operating costs, and 25% faster onboarding for new hires. Microsoft 365 Copilot helps SMBs achieve these potentially huge financial benefits from faster time to market, increased productivity, and improved employee satisfaction.

¹New Technology: The Projected Total Economic Impact of Microsoft 365 Copilot for SMB | Forrester, commissioned by Microsoft, October 2024



How Lanter can help

Lanter is here to help with every step of your Copilot Business journey. Get in touch to learn more and request a readiness assessment.

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